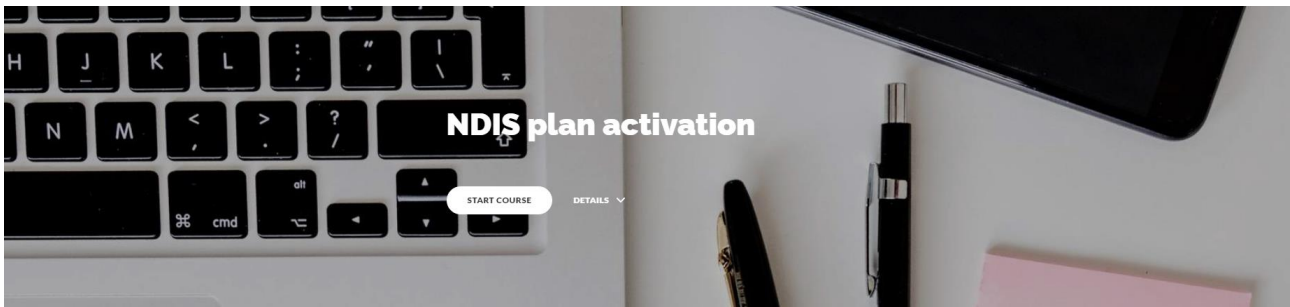


This PDF is available as an additional resource to complement the interactive training module.

Significant functionality is lost with the translation to PDF and we recommend all staff to complete the online version.



This training is for providers and/or health professionals who are supporting people to start using their NDIS plans. It is also for providers who are delivering NDIS services.

The information in this module is general in nature. Every organisation does things differently and has different policies and procedures, so please interpret the content in this module with your organisation in mind and discuss any discrepancies with your line manager.

Duration: Approximately 30 minutes (note. you can close the training and pick up where you left off at a later date).

Last updated: February, 2022

Content and links in this training were correct at the time of publication. We check these regularly; however, if you find broken links or errors please contact transitionsupport@flinders.edu.au

Course Outline

- ≡ Training objectives
- ≡ COVID-19 update
- ≡ Overview
- ≡ NDIS participant portal
- ≡ Choosing services and providers
- ≡ Setting up and paying for a service



Training objectives

This training is for providers and/or health professionals who are supporting people to start using their NDIS plans. It is also for providers who are delivering NDIS services.

It is designed to provide a simple overview of how a participant can use their funding to set up and pay for a service. You can then apply this information to different situations depending on your role.



Assumed knowledge

This module is about using NDIS funding and assumes an understanding of NDIS plans and the rules for service delivery. We have training modules to cover all of this which you can find on the training page of our website. We recommend you complete the following training:

- ☐ Understanding NDIS plans
- ☐ Service agreements in the NDIS
- ☐ Support coordination in the NDIS

COVID-19 update

COVID-19 changes

The NDIA have made a number of short-term changes to the way that people can use their NDIS funding as a result of COVID-19. Some of the content discussed in

these training modules may not apply to the current context. A summary of the major COVID-19 related changes is discussed here, including links to further resources. These changes are likely to be reviewed in the coming months.

Key changes

New line items for support coordination

From 25 March 2020, the support items for Support Coordination were temporarily duplicated into the Core Support Category – Assistance with Daily Life – so that participants can have greater access to support coordination services if they need them. Read more on the [COVID-19 updates Support Coordination page](#).

Increased plan flexibility

Core funding is now completely flexible, people with any core funding can use this funding to purchase any services/supports across the four categories. There are also several new capacity building line items to provide further flexibility using capacity building budgets and an easier process to request a transfer of funds from capacity building to core if necessary. This is a continually evolving space, we recommend staying up to date by regularly checking the NDIS ['using your budget'](#) updates.

Phone planning

Planning and review meetings are now held over the phone instead of face to face. Existing plans will be automatically extended by 12 months until a plan review can be scheduled. Read about planning on the ['your plan'](#) page.

Provider flexibility

There are a number of changes to service delivery including broadening the criteria for charging for cancellations, and allowing an increased price loading in some circumstances.

All relevant information including updates, FAQs and information packs can be found on the NDIS Coronavirus information and support page.

Coronavirus (COVID-19) information and support

We know that participants, their families and NDIS providers may be looking for workers to deliver disability supports, and provide extra cover at the moment. For participants, there are a number of online matching platforms that can help you quickly and easily connect to support workers.

READ MORE NDIS

Overview

Once a person's plan has been approved, a copy is given to the participant. This may happen in person, or via mail. An electronic copy of the plan will also be available on the NDIS participant portal shortly after the plan is approved.

In most instances, the participant will be connected with someone who can help them to start using their plan. Usually, this will be either a support coordinator or a local area coordinator (LAC).

SUPPORT COORDINATORS

If the person has funding for support coordination in their plan, then the first step is to find a support coordinator. Sometimes the person may already know who they want their support coordinator to be and can start working with them straight away. Otherwise, the planner or LAC will assist and help connect with a support coordinator.

[Starting my plan with a support coordinator \(NDIS website\)](#)

LACS

LACs can also help people to use their plan and start finding supports. If the person does not have support coordination included in their plan then they might meet more regularly with their LAC.

[Starting my plan with an LAC \(NDIS website\)](#)

Tip: If you think a person will need support coordination funding in their plan it is helpful to discuss this at the planning meeting. The planner will need to see that the person has complex support needs (e.g., many services to access, significant challenges accessing services). See our '[Support coordination](#)' and '[Preparing for planning meetings](#)' training modules for more detail.

Planning pathways

As the NDIS continues to grow the NDIA have been making changes to improve people's experience with the scheme. The [NDIS pathway reform webpage](#) details some of the changes that have been made to date to improve the planning process. You may notice differences in the planning process depending on where you work as changes continue so it is a good idea to chat to your colleagues about how plans are being developed and activated in your area.

Transitioning to NDIS supports

All NDIS participants will have a dedicated NDIA contact person who they can talk to about their plan. The contact details for this person will be included on the top of their plan. However, sometimes people might want support from their existing providers to help them to connect with a support coordinator, with their LAC or with another funded support.

In this module we will go through the steps involved in setting up an NDIS service using an example scenario. You can then apply these steps to any type of NDIS service.

Setting up an NDIS service

- 1 Access the NDIS participant portal
- 2 Search for possible providers
- 3 Contact the provider(s) and discuss goals / service needs
- 4 Once the person has chosen a provider, set up the service agreement
- 5 Create a service booking in the NDIS portal
- 6 Start accessing the service
- 7 Pay for the service

Resources

The following resources may be helpful for participants who want to know more about how to get started with their NDIS plan.

- [Using your NDIS plan - NDIS participant booklet](#)
- [Using your NDIS plan - webpage](#)

NDIS participant portal

The first step in plan activation is getting on to the participant portal. Here, a person can view their plan and manage their funding.



The NDIS myplace portal for participants is a secure website that the person can access via their myGov account.

The first time a person wants to access their myplace account they will need an [activation code](#) which will be sent to them by the NDIA. The code is only required the first time the person uses the system.






There are two 'myplace' portals - one for participants and one for providers. The two

portals 'talk' to each other so that providers and participants can work together to manage their services.

myplace step-by-step guide

The NDIS have developed a step-by-step guide with screen shots that explains all the functions of the myplace participant portal. [MYPLACE GUIDE](#)

Below are some handy screen shots showing some of the things people can do in myplace. Download the step-by-step guide for more comprehensive information.

Tile	Name	Function
 My Payment Request Manage Payment Request	My Payment Request	If you are self-managing all or part of your NDIS plan, this is where you can create, view and manage your payment requests (claims).
 My Plan Access all information associated to your plan as well as helpful documents	My Plan	Once you have an approved NDIS plan, this is where you can view the details of your plan.
 My Contact Details View and edit my contact details	My Contact Details	View and edit your contact details, bank account details and consent to share your plan with providers here.
 My Service Booking Create and manage service bookings	My Service Bookings	Once you have an approved NDIS plan, this is where you can create, view and manage your Service Bookings with registered NDIS service providers (not applicable if you are self-managing).
 Provider Finder Find a provider close to you	Provider Finder	Use the Provider Finder to find a registered NDIS service provider near you.

Portal homepage: Participants can easily navigate the different functions of the portal using the tiles

My Contact Details

Edit your contact details below

Required fields are marked with an asterisk (*)

Open all sections

Close all sections

About Me

Open Section

How Can NDIA Contact Me?

Open Section

How Can I Contact NDIA?

Open Section

My Address Details

Open Section

My Relationship Details

Open Section

Share My Plan

Open Section

My Bank Details

Open Section

Open all sections

Close all sections

Participants can use the portal to tell the NDIA how they want to be contacted, view their relationships (e.g., nominees or people who are helping them with their plan) and make sure their bank and address details are up-to-date.

Skip to main content

Hello JOHNS

myplace

Home / My Plan

My Plan

View My Plan

View current NDIS plan

My Helpful Documents

View and save NDIA factsheets and documents

My Support Budget

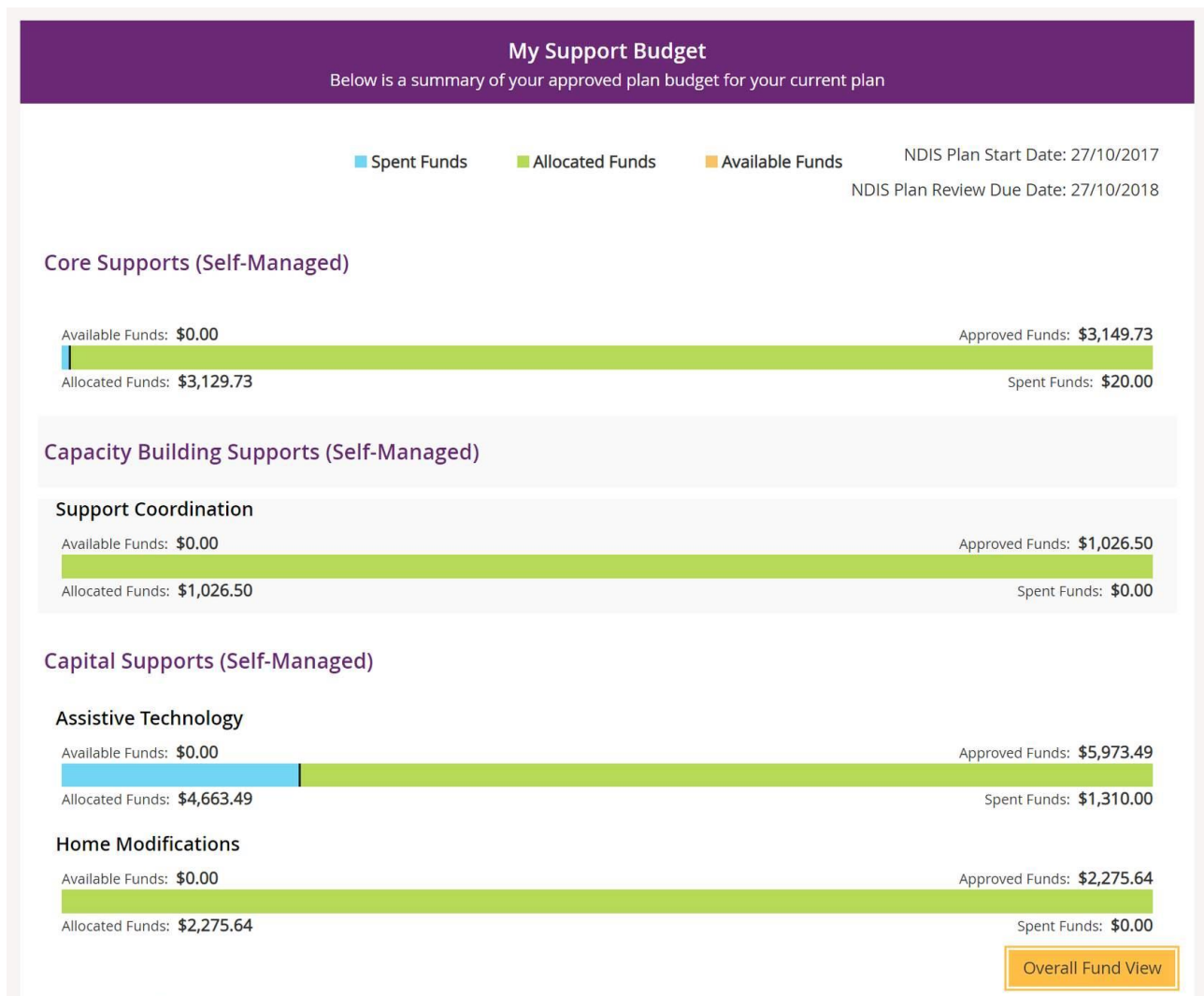
View approved support budget

My Referrals

View my referrals to providers or community groups

8

Participants can view their plan through the portal - from this page they can also print hard copies or download PDFs of their plan.



In myplace, participants can view their support budgets and see a breakdown of how much money they have left in each category

Share My Plan
Close Section

Share plan with Providers

Providers **will see**

- Personal information (name, preferred name, gender, NDIS number, date of birth and if an interpreter is required)
- Goals
- Plan start and end date
- Nominee information (if supplied)

Providers **will not see**

- Support items and items codes
- Budget details

Providers with an active service booking are listed below. Please select providers to share plan with.

☒
Manishs Wheelchairs

Share plan details with all new providers whenever a new service booking is created ☐

Why are you updating or changing who can see the plan?*

Provide the reason for updating who can see the plan (Max 240 characters)

[Show changes to who can see the plan](#)

Participants can choose to share parts of their plan with providers who they have active service bookings with. (If you are supporting someone without an active booking in place you will need to ask them for a hard copy/PDF if you want to see their plan.)

Choosing services and providers

Before you can set up a service you need to understand a person's plan, how they can use their funding and where they can find providers. We have separate training modules that cover these in greater detail.

Complete our 'Understanding NDIS plans' training

It has information about understanding funding budgets and flexibility.

[GO TO TRAINING](#)

Complete our 'Service agreements in the NDIS' training

It has information about how to find providers, rules for service delivery and how to set up a service agreement.

[GO TO TRAINING](#)

Scenario

Billy has an NDIS plan and has come to you for some help to get it started. One of her main goals is to get out in the community a bit more and make some new friends. She brings her plan along for you to have a look at.

START >

Step 1

Funding categories

There are a lot of different ways that people can use their NDIS plans to pay for services relating to community access and social interaction - funding in any of these categories would be relevant to this goal.

Tip: if you don't know what types of services can be purchased with each support category make sure you complete our 'Understanding NDIS plans' training module.

NDIS support category	Services
Assistance with social and community participation (Core)	Support to attend social activities, group activities in a centre.
Increased social and community participation (Capacity building)	Skills building activities, individual or group based.
Improved relationships (Capacity building)	Specialist behavioural interventions for people with complex needs OR individual social skills development.

Step 2

Billy's plan

Capacity Building Supports	Budget
<p>Increased social and community participation (CB social, community and civic participation)</p> <p>Supports to build my skills so that I can participate in community, social and recreational activities.</p> <p>My Increased social and community participation funding will be:</p> <ul style="list-style-type: none"> \$3,000 NDIA-managed 	<p>\$3,000</p>

You have a chat with Billy about how she would like to progress toward her goal of making friends. She tells you that she likes the idea of doing some group activities one day but is very nervous in social situations. You suggest that maybe she would like to work with someone one-on-one to help her feel more comfortable in social situations and she agrees this would be helpful.

Billy has \$3,000 dollars in her 'increased social and community participation' budget which could be used to pay for some social skills training.

Step 3

Support needs

You already know of some providers in the region who provide social skills training for people with psychosocial disability. To help narrow it down, you have a chat with Billy about the kinds of things she would want from her provider. You learn that she would prefer:

- someone close by so that she doesn't need to travel much
- to work with the same person every time and feels more comfortable working with women who are a similar age to herself
- to start off small, maybe an hour a fortnight so she can get to know the person gradually.

Step 4

Meet with providers

You now know that Billy needs a flexible provider, who is nearby or willing to travel, who will do one-hourly appointments and doesn't use a rotating roster system.

You present Billy with a few options and ask how she would like to proceed. She would like to meet with a few in person and make a decision. With your support she arranges to visit some providers and talk to them about their service options.

[The Reimagine website](#) includes some great tips for participants about how to select a service provider including what questions to ask when you meet them.

Provider selected

Billy decides she would like to work with FiveStar Recovery Services. She was able to meet her new support worker when visiting the organisation and is comfortable that they will work well together. You have had a chat with her about her rights as an NDIS participant and she knows that she can change her mind if the service isn't right for her.

Together, Billy and FiveStar Recovery create a service agreement which outlines how Billy and FiveStar will work together. See our [Service Agreements training](#) for more information on developing service agreements and the rules for service delivery.

START AGAIN

FAQ

What if there are no suitable providers available?

Sometimes you might find it difficult to find some providers for specific services. Remember that NDIS funding is flexible and there is room to be creative. There are a couple of different options for you to consider if you are struggling to find providers:

- Are there unregistered providers who can support the person and if so can the person access self-managed/plan-managed funding? (If they don't have this in their plan already you can call the NDIA and ask for a review of the funding management.)
- Is there another way the person can work toward the same goal? For example, if you are seeking therapy providers but there are long waiting lists, are there different providers (e.g., support workers, therapy assistants) that can also provide suitable services?
- Contact your local NDIA office and let them know you are having difficulty. They may be able to offer some ideas.

Don't forget to document any difficulties you have spending NDIS funding - this is helpful at plan review (see our [training module on plan reviews](#) for more detail).

What if I need help interpreting a person's plan?

In the example above we matched a support budget with a service type and then found a provider who offers this service.

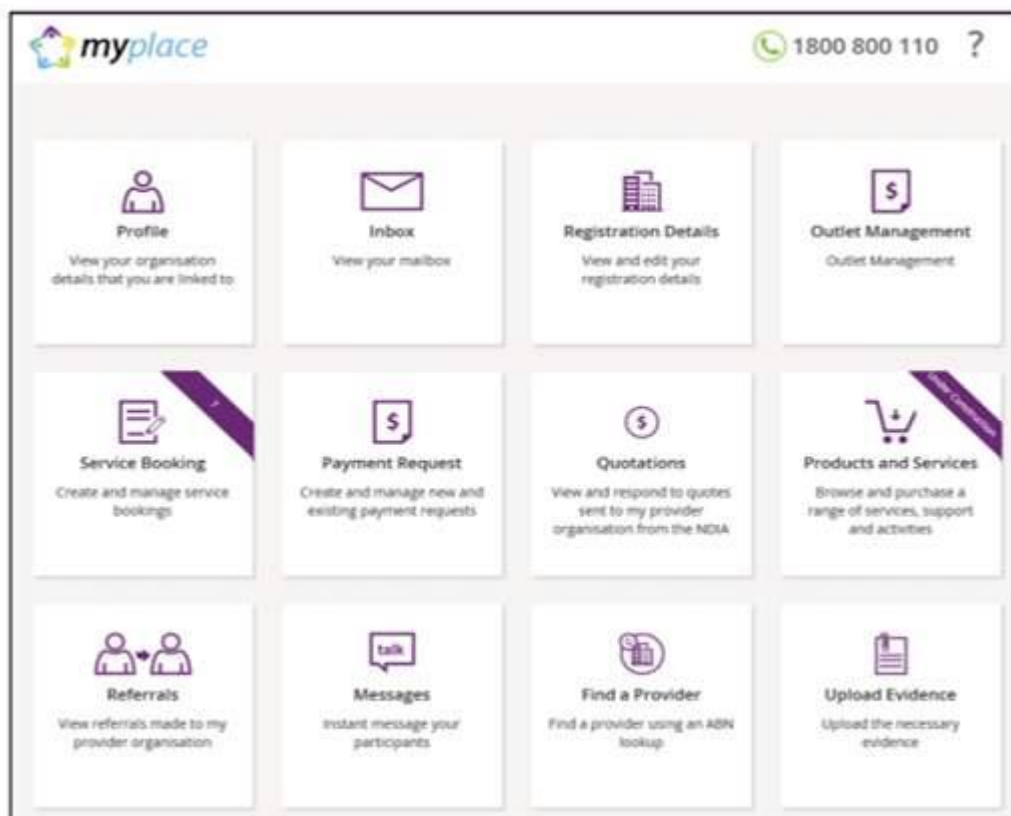
However, because NDIS funding is flexible, you can often use different categories to pay for the same service. If you know there are providers that offer the types of services you are looking for, but don't know exactly which support budget a person needs to pay for that service - give the provider a call. They will be able to tell you how they charge for services and which support category or categories a person needs to access their service.

Setting up and paying for a service

Once a provider has been selected and a service agreement has been signed, the next step is to arrange for a service booking so that the person can pay for the service from their plan.

The information provided on this page is relevant when participants have agency managed funds. For more information about when a participant has plan-managed or self-managed funds, see the FAQs section at the bottom of this page.

myplace provider portal



Registered providers of NDIS supports will have a myplace account.

This is where you can manage all services that you provide to NDIS participants. You can view the plan for any participant that has agreed to share it with you, book appointments and provide quotes to the NDIA.

A [step-by-step guide to using the myplace portal](#) is available on the NDIS website. It covers everything you need to know about using the portal to provide NDIS services.

Service bookings

Service agreement

A service agreement is a contract between the provider and the participant. It describes how services will be delivered and the rights and responsibilities of providers and participants when working together. Before a service booking is made you would need to have a signed service agreement.

Service booking

A service booking is a contract between the provider and the NDIA to pay for the services as agreed with the participant in the service agreement. A service booking ensures that providers can be paid for the services that they have agreed to deliver.

Home / Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant

Enter participant name or NDIS number

Refine Search

Search

Booking Number

Please enter 8 digits

Status

All

Initiated By

All

Search Results

550 Results found

Sort By

Service Booking Number

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50015923	Standard Booking	ashwin first (430214424)	27/09/2018	27/09/2019	27/09/2018	Active	Staff
50015922	Standard Booking	ashwin first (430214424)	27/09/2018	30/11/2018	27/09/2018	Active	Provider

Before a service can be provided there needs to be a service booking in the provider portal. This can be created by the provider or by the participant. Approved bookings are available in both the provider and participant portal.

Provider initiated bookings are automatically approved by the system, however participants can view and change bookings if required. There may also be times when a participant needs to review a booking before it can be approved- if this is the case it is important that the provider lets the participant know that they need to log into the system.

Service booking key facts (see the [the step-by-step user guide](#) for more detail)

- ☐ Service bookings essentially 'quarantine' a specified amount of funding aside for delivery of the agreed services. This means that the money can't be used to buy other services or accessed by other providers.
- ☐ Service bookings can be made for the whole amount of funding that will be spent on the service over the course of the plan, or part of the amount (an additional booking would need to be made later).
- ☐ It is best practice to create service bookings at the support category level rather than for the specific line item. This means that providers can be more flexible about the services they provide within that funding category without needing to create new service bookings.

Payment requests

Home / Payment Request / Search / New Payment Request

New Payment Request

Submit a new payment request for a support you have recently provided.

Participant Details

Participant Name: Mr. ashwin first
NDIS Number: 430214424

Payment Request Details

New Payment Request - Help ?

Required fields are marked with an asterisk (*)

Support Start * Date:	<input type="text" value="DD/MM/YYYY"/>	Support End Date: *	<input type="text" value="DD/MM/YYYY"/>	Invoice Number: *	<input type="text" value="eg. Up to 50 c"/>
Support Category: *	<input type="text"/>	Item Number: *	<input type="text"/>	Cancellation Reason:	<input type="text"/>
Claim Type:	<input type="text"/>	Unit of Measure:	<input type="text"/>	GST:	<input type="text" value="GST Free"/>
Item Quantity: *	<input type="text" value="eg. 0"/>				
Payment Amt (\$): *	<input type="text" value="eg. 0.00"/>				

A service booking is an agreement to set aside the funds for a particular provider. The provider is not paid for the support until they put in a payment request against that service booking.

This happens after the service has been delivered. Some providers may 'draw down' (e.g., make a payment request) on a service booking after each session of support, or they may do it in bulk, say at the end of every month.

Example

Billy has already signed a service agreement with FiveStar and is ready to start using her supports. This is an example of how a service booking might look for Billy.

START >

Step 1

Booking amount

Capacity Building Supports

Budget

Increased social and community participation (CB social, community and civic participation)

Supports to build my skills so that I can participate in community, social and recreational activities.

My Increased social and community participation funding will be:

- \$3,000 NDIA-managed

\$3,000

Billy agrees to work with FiveStar Recovery fortnightly, increasing this to weekly when she feels more comfortable.

The cost of the service is \$58.82 per hour. Billy has \$3,000 dollars to spend on capacity building supports in the increased social and community participation category. If she chooses to spend all of that money on individual skills building she can access about 51 hours of support ($\$3,000 / \58.82).

After a discussion with Billy, FiveStar agree to create a service booking for 30 hours of support ($30 \times \$58.82 = \$1,764.60$) and agree to review the support use regularly.

Step 2

Booking details

FiveStar Recovery create a service booking for 30 hours of support within the 'social and community participation' support category.

When Billy logs into her myplace account she can see that she has committed part of her funding in that category to FiveStar and that there is still some money left for other services, or for her to increase her service use with FiveStar.

Step 3

Payment request

A	B	C	D	E	F
Support Category Name	Support Item Number	Support Item Name	Support Item Description	Unit	National
Increased social and community participation	09_006_0106_6_3	Life Transition Planning Incl. Mentoring, Peer-Support And Indiv Skill Deve	Establishing volunteer assistance within the parti	H	\$60.16
Increased social and community participation	09_007_0117_6_3	Skills Development In A Group	Training for the participant in a group of 2 or mori	H	\$29.26
Increased social and community participation	09_008_0116_6_3	Innovative Community Participation	Mainstream services that promote inclusion of pe	EA	
Increased social and community participation	09_009_0117_6_3	Individual Skills Development And Training	Individual life skills development and training inc	H	\$58.52
Increased social and community participation	09_010_0125_6_3	Community Participation Activities	Participation in community based activities that t	YR	

Billy has her first appointment with FiveStar. She meets her support worker for an hour at her office.

FiveStar then submit a payment request for one hour of support. For the payment request they need to specify which support item they delivered. In this case it was 'individual skills development and training'.

The NDIA pay FiveStar for the hour of support provided. When she next goes onto the portal Billy can see that she has spent \$58.82 from her plan on services from FiveStar. *Click to zoom on image - extract from support catalogue showing relevant support items and prices.*

Step 4

Checking in

A	B	C	D	E	F
Support Category Name	Support Item Number	Support Item Name	Support Item Description	Unit	National
Increased social and community participation	09_006_0106_6_3	Life Transition Planning Incl. Mentoring, Peer-Support And Indiv Skill Deve	Establishing volunteer assistance within the parti H		\$60.16
Increased social and community participation	09_007_0117_6_3	Skills Development In A Group	Training for the participant in a group of 2 or more H		\$29.26
Increased social and community participation	09_008_0116_6_3	Innovative Community Participation	Mainstream services that promote inclusion of pe EA		
Increased social and community participation	09_009_0117_6_3	Individual Skills Development And Training	Individual life skills development and training inc H		\$58.52
Increased social and community participation	09_010_0125_6_3	Community Participation Activities	Participation in community based activities that b YR		

Billy has been working with FiveStar for 6 months and has used 25 hours of support. She has been enjoying her sessions. FiveStar also provide group activities and Billy decides she wants to use their services for this as well. Together they update the service agreement to reflect this.

Billy and FiveStar modify the existing service booking so that the rest of the money in Billy's 'increased social and community participation' budget is allocated to FiveStar. FiveStar can submit payment requests for either the group activities or the individual sessions against the same service booking.

Click to zoom on image - extract from support catalogue showing relevant support items and prices.

Summary

There are a lot of different ways that providers can set up service booking. It is best to keep these flexible and check in regularly with the participant.

START AGAIN

NDIS provider information

The [NDIS provider pages](#) include essential resources for anyone providing NDIS services. They are also helpful if you are supporting a person to use NDIS services, covering all the ins and outs of accessing and providing services in the NDIS and including step-by-step guides for using the provider portal.

FAQ

Do self-managed participants need service bookings?

No, self-managed participants need to talk to their providers about their preferred billing and payment options. Providers may prefer people to pay for services at the time it is delivered, or provide invoices.

Do plan-managed participants need service bookings?

Participants will create a service booking with their plan manager that sets aside their plan-managed funding. The plan manager will then claim against this service booking for services accessed using plan-managed fundings.

More on this in the [Myplace provider step by step guide](#)

How do providers claim for travel costs?

It is important that providers understand the [rules for charging for travel](#) and have an agreement with the participant when travel is charged against the plan.

When making a payment request against a service booking the provider then simply selects 'provider travel' when selecting what type of claim they are making.

How do providers claim for cancellations?

Again, it is important you know the rules for charging for cancellations (see the [NDIS price guide](#) for more information or our '[service agreements training module](#)').

As long as the cancellation is allowed within the NDIS rules, providers can easily claim for cancellations against the existing service booking by selecting a 'cancellation reason' when making the claim.

